



SUMMARY OF GOALS

Organizational Excellence. Strengthen the organization and workforce to perform our core functions and responsibilities.

Planning and Infrastructure. Implement comprehensive, integrated, and innovative infrastructure planning to strengthen existing services, minimize life cycle costs, and prepare for the future.

Environmental Stewardship. Protect and sustain our watersheds to maintain water resources, ecosystems, and communities.

Emergency Preparedness. Build organizational resilience and ensure effective emergency response to extreme weather events, disasters, and security risks.

Climate Change. Assess risk and uncertainty of climate change, and develop and take actions that improve resiliency and sustainability.

Community Engagement. Engage with the community to build understanding, trust, and support for projects and programs.

Message from General Manager Grant Davis



Last spring Sonoma Water committed to developing a five-year 2023 Strategic Plan that focuses on our core functions of water supply, wastewater, and flood control. In this Strategic Plan, we are looking at a future that is very different from our past as we face challenges and opportunities presented by climate change, evolving technology, and aging infrastructure. Our new Mission, Vision, and Strategic Plan provide a framework for allocating resources and guiding decisions that support innovative responses to these challenges and that take advantage of opportunities.

During the Strategic Plan process, we heard from our employees, stakeholders, and water contractors through an engagement survey, focus groups, and direct conversations. The input we received highlighted our community's desire that Sonoma Water continues to conduct its work with a focus on integrity and transparency. A Strategic Plan Advisory Committee composed of representatives from all of Sonoma Water's divisions met more than 12 times, using an iterative collaborative process for input and feedback.

This Strategic Plan is a living document that will be monitored and adapted as needed over the next five years. One of the key roles of Sonoma Water's newly created Office of Project Management is to ensure the successful implementation of the Strategic Plan.

I want to extend my sincere appreciation to the Board leadership, employees, and everyone who engaged in the process. I am excited to share this 2023 Strategic Plan, which builds on our strengths and lays the groundwork for ambitious possibilities at Sonoma Water.

VISION STATEMENT

Ensuring resilient water resources now and for future generations.

MISSION STATEMENT

To provide reliable water supply, wastewater management, and flood protection — essential services for a thriving community and a healthy environment.

VALUES

Community. Supporting our community by providing vital, high-quality services through sound operations, open communication, inclusive engagement, and timely response.

Our Team. Cultivating a strong, collaborative workforce driven by clear goals, transparent communication, and job satisfaction.

Equity. Advancing policies and practices that foster an inclusive working environment and culturally responsive services to meet the diverse needs of the community.

Resilience. Developing innovative, sustainable solutions for reliable operations through infrastructure investment, maintenance, and preparation for climate change and disasters.

Integrity. Ensuring accountability through sound and clear business practices.

Environmental Stewardship. Protecting and enhancing the natural resources in our care.



Goal: ORGANIZATIONAL EXCELLENCE

Strengthen the organization and workforce to perform our core functions and responsibilities.

Strategy: Create an environment that attracts, retains, and engages a high performing, diverse, and inclusive workforce.

Action Items

- Establish clear performance management practices to achieve and support a high-performance culture and recognize employee contributions.
- Prioritize workforce development to grow and preserve intellectual capital at all levels of the organization.

Strategy: Implement organizational development practices to enhance internal communications, decision-making, resource alignment, and project management processes.

Action Items

- Evaluate and refine organizational structure to ensure optimal alignment and allocation of resources.
- Improve communication and internal business processes to enhance transparency and internal coordination.
- Improve internal records management to maximize utility, accessibility, and security.

Strategy: Ensure financial integrity and stability by implementing sound and equitable practices to meet infrastructure and service needs.

Action Items

- Ensure adequate funding and increase grant revenues to support priorities.
- Further develop budget tracking tools, long range financial plans, and fiscal processes.
- Update and refine plan to improve procurement processes.
- Initiate development of business plans to improve flood and sanitation financial and operational stability.



Goal: PLANNING AND INFRASTRUCTURE

Implement comprehensive, integrated, and innovative infrastructure planning to strengthen existing services, minimize life cycle costs, and prepare for the future.

Strategy: Conduct planning that integrates and balances operational, maintenance, and infrastructure priorities.

Action Items

- Conduct and update natural hazard vulnerability assessments to reliably meet performance requirements and service goals.
- Continue to engage in planning efforts and partnerships to protect and enhance our water supply.
- Continue to engage in planning efforts to support reliable wastewater and flood management services.
- Continue to identify opportunities to implement renewable and efficiency-enhancing energy projects to meet energy policy objectives.

Strategy: Implement the Computerized Maintenance Management System and Asset Management Program.

Action Items

- Implement and sustain the new Computerized Maintenance Management System (CMMS).
- Complete the development of the Asset Management Program (AMP).
- Assess the staffing needs to support the use of the CMMS and develop a recommendation for the structure of an Infrastructure Planning/Asset Management team.
- Improve the process through which projects are identified, prioritized, funded, and scoped to develop the annual five-year Capital Improvement Plan.

Strategy: Fund and implement the planned capital and maintenance projects on schedule to ensure reliable services.

Action Items

- Identify and build out staffing needed to meet volume of projects.
- Fund Capital Improvement Program budgets to meet infrastructure needs.
- Implement standardized project management practices.

Strategy: Develop processes for addressing emergency or urgent infrastructure repairs.

Action Items

- Assess and establish staff assignments necessary to efficiently respond to urgent needs while minimizing adverse impacts to normal operations.
- Establish contractor, consultant, and vendor contracts to be used for urgent projects.



Goal:

ENVIRONMENTAL STEWARDSHIP

Protect and sustain our watersheds to maintain water resources, ecosystems, and communities.

Strategy: Ensure current and future water supply reliability by complying with the Federal and State Endangered Species Acts.

Action Items

- Ensure current and future water supply reliability by complying with the Federal and State Endangered Species Acts.
- Complete and submit to resource agencies the biological assessment for the next Russian River Biological Opinion.
- Implement the 2023 Russian River Biological Opinion.

Strategy: Protect, enhance, and monitor natural resources, watershed conditions, and ecosystem health that are vital to the Russian River, Petaluma River, and Sonoma Creek watersheds.

Action Items

- Support collaborative efforts to improve habitat and pursue restoration opportunities that provide integrated regional benefit.
- Conduct fisheries, wildlife, and water quality monitoring through existing programs and use of new technologies.
- Identify options to meet vegetation mitigation and restoration needs.

Strategy: Ensure that environmental and ecosystem considerations are incorporated into water resources planning, capital, operations, maintenance, and restoration project implementation.

Action Items

- Support regular interdepartmental coordination meetings to share understanding of current regulatory requirements.
- Anticipate and respond to new requirements of the California Environmental Quality Act, National Environmental Policy Act, and listing of new species under State and Federal Endangered Species Acts.

Strategy: Provide regional leadership in salmonid species recovery and improving watershed health through partnerships on technical and policy-related initiatives.

Action Items

- Continue to provide support to the Russian River Regional Monitoring Program (R3MP) by sharing technical expertise and resources.
- Continue to implement the California Department of Fish & Wildlife's Coastal Monitoring Program in the Russian River watershed.
- Continue to provide technical support to regional partners through drought response activities.



Goal:

EMERGENCY PREPAREDNESS

Build organizational resilience and ensure effective emergency response to extreme weather events, disasters, and security risks.

Strategy: Strengthen and ensure a comprehensive emergency response capability through coordinated response programs, resource management, and emergency planning.

Action Items

- Fully develop and enhance the capabilities of the Emergency Operations Center (EOC).
- Establish operational emergency response functions, procedures, and systems.
- Develop robust, redundant, voice and data communications capabilities to sustain interagency, multi-jurisdictional communication.
- Improve coordination with water contractors, regulatory agencies, and government partners.
- Maintain an emergency management training and exercise program that prepares staff for response and recovery activities.
- Develop and maintain a business continuity program that plans for and minimizes disruptions to Sonoma Water's essential business functions.

Strategy: Enhance and maintain effective cybersecurity practices.

Action Items

- Ensure all cybersecurity incidents are reported and reviewed, and lessons learned are incorporated into future cybersecurity program updates or enhancements.
- Conduct cybersecurity vulnerability assessments and maintain an active cyber threat assessment program to adapt to increased threats.
- Conduct regular cybersecurity exercises and drills that address the full range of threats.

Strategy: Develop and implement a comprehensive physical security program.

Action Items

- Establish a security program for staff, infrastructure, sites, and other related assets.
- Ensure appropriate site security, access control, monitoring, and other type surveillance systems are implemented, maintained, and enforced.
- Enhance security systems and staff response capabilities through regular training, exercises, and drills.



Goal:
CLIMATE CHANGE

Assess risk and uncertainty of climate change, and develop and take actions that improve resiliency and sustainability.

Strategy: Develop and implement practices to understand and minimize vulnerability to climate change impacts.

Action Items

- Ensure alignment with the Board-approved Climate Adaptation Plan by establishing interdisciplinary climate resilience teams.
- Support interagency partnership efforts addressing regional climate-resiliency planning and projects.
- Collaborate with partners to address sea level rise impacts to services in the Sonoma and Petaluma Baylands.
- Develop inclusive practices for Sonoma Water's climate mitigation and adaptation efforts considering the needs of under-resourced and under-represented communities.
- Continue legislation support and policy development at national, state, regional, and local levels.

“This Strategic Plan is a living document that will be monitored and adapted as needed.”

~ Grant Davis, General Manager



Goal:
COMMUNITY ENGAGEMENT

Engage with the community to build understanding, trust, and support for projects and programs.

Strategy: Focus public outreach and engagement to increase understanding of Sonoma Water's needs and challenges for infrastructure investments.

Action Items

- Assess existing outreach strategies and activities to refine and implement a plan that better tells the infrastructure, natural hazard, and climate risk story.
- Continue to educate students and the public on topics that affect our water supply, flood control, and wastewater systems.

Strategy: Build collaborative partnerships, trust, and long-term relationships with the community through proactive communication and education.

Action Items

- Continue leveraging existing partnerships, advisory groups, and employees throughout the agency to educate the community about infrastructure vulnerabilities, needs, and improvements.
- Establish new and strengthen existing partnerships to bring unique perspectives from under-represented people to further diversify our community messengers.
- Continue partnerships with organizations such as Russian River Watershed Association and Sonoma Clean Power to provide education programs to students outside Sonoma Water's water supply service area.

Strategy: Communicate through inclusive channels, methods, and appropriate languages that reach all key audiences.

Action Items

- Identify key audiences (customers, public including historically underserved people, policymakers, and water contractors) and evaluate and update current communication tools and messages.
- Identify technical experts from each division who will assist in developing outreach material and ensure that communication strategies, key messages, and stakeholder engagement accurately reflect programs and projects.
- Utilize and measure engagement and impact of multiple platforms to evaluate messaging for audiences.